

ABA Advanced Trust School Schedule September 22 - 27, 2019



American
Bankers
Association®

September 22 Sunday	September 23 Monday	September 24 Tuesday	September 25 Wednesday	September 26 Thursday	September 27 Friday
	Breakfast 7:00 AM – 8:00 AM	Breakfast 7:00 AM – 8:00 AM	Breakfast 7:00 AM – 8:00 AM	Breakfast 7:00 AM – 8:00 AM	Breakfast 7:00 AM – 8:00 AM
REGISTRATION 10:30 AM - 12:30 PM	Special Needs Trusts 8:00 AM - 10:00 AM <i>Kristen Lewis</i>	Advanced Generation Skipping Tax 8:00 AM – 10:15 AM <i>Tom Abendroth</i>	Case Study Review 8:00 AM - 8:45 AM <i>Colin Korzec</i>	Insurance for Trust Professionals II: Property and Casualty 8:00 AM - 10:00 AM <i>Judith Pearson</i>	Relationship Management 8:00 AM - 8:45 AM <i>Joseph Sicchitano</i>
ORIENTATION 12:30 PM - 1:00 PM	Case Study Intro & Work 10:15 - 11:30 AM <i>Colin Korzec</i>	Funding the Marital & Credit Shelter Trust 10:30 AM - 12:30 PM <i>Skip Fox</i>	Advanced Estate Planning Techniques 9:00 AM – 11:00 AM <i>Steve Goodman</i>	Estate Planning - Retirement Assets I: 10:15 AM - 11:45 AM <i>Tom Pauloski and Tom Lasley</i>	Ethics: Challenges in Recognizing Elder Abuse 8:45 AM - 9:30 AM <i>Mary Radford</i>
Trending Topics in Trust 1:00 PM - 3:00 PM <i>Phoebe Papageorgiou Benetta Jenson Abigail Earthman</i>	LUNCH	LUNCH	LUNCH	LUNCH	Certificate of Completion & School Adjourns 9:30 AM - 10:00 AM
Advanced Topics in Discretionary Distributions 3:15 PM - 6:00 PM <i>Domingo Such</i>	Ethics of Trust Administration 12:30 PM - 2:15 PM <i>Steve Goodman</i>	Advanced Fiduciary Income Tax 1:30 PM - 4:30 PM <i>Skip Fox</i>	Federal Tax Elections 12:30 PM – 2:30 PM <i>Mark Shiller</i>	Estate Planning - Retirement Assets II: 12:45 PM - 2:15 PM <i>Robert Dietz and Tom Lasley</i>	
	Trust Risk & Compliance 2:30 PM - 4:30 PM <i>Kent Lytle</i>		Practical Application of Investment Concepts 2:45 PM - 5:15 PM <i>Sean McCarthy</i>	Fiduciary Administration III: Making Complex Fiduciary Decisions 2:30 PM - 5:00 PM <i>Max Schanzenbach</i>	
Welcome Reception 6:30 PM - 7:30 PM Heavy appetizers and/or Dinner on your own		CTFA Study Review 7:00 PM - 9:00 PM	CTFA Study Review 7:00 PM - 9:00 PM	Closing Celebration 6:00 PM - 9:00 PM Heavy appetizers and/or Dinner on your own	